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# Integrating Creativity into Human Resource Development: Developing Training for the Healthcare Domain

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## ABSTRACT OF A PROJECT

### *Integrating Creativity into Human Resource Development: Developing Training for the Healthcare Domain*

The purpose of this project is to integrate creativity into human resource development, training in the healthcare domain. I seek to offer insight on using creativity skills in a training module to deliver a customer service workshop to healthcare professionals. Healthcare has recently been a provocative topic to discuss for all walks of life. Its complexities in how to administer service, the rising cost of insurance, the quality of human care, and a growing elderly population with multiple medical conditions is some of the issues that cause distress to healthcare providers and recipients alike. I see training creatively as a way to offer new solutions to old problems. The project includes a facilitator learner guide, the participants' feedback to the workshop, a handout brochure for the participants and recommended readings for the reader to further investigate facilitation and training.

*Key words: facilitation of creativity, corporate training, creative problem solving*

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Jamilla M. Walker

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Date

Buffalo State College  
State University of New York  
International Center for Studies in Creativity

*Integrating Creativity into Human Resource Development: Developing Training for the  
Healthcare Domain*

A Project  
in Creative Studies  
by  
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Submitted in Partial Fulfillment  
of the Requirements  
for the Degree of  
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Dates of Approval:

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Project Advisor

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Jamilla Walker  
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I would like to thank my mother, DeLois Rivers who taught me to be inquisitive, to ask questions, to seek knowledge, to be determined, and persevere through adversity. Growing up I watched you exemplify the spirit of creativity. Being a visual person you see the big picture and you have the ability to develop those visions into reality.

To my dad Charles Rivers, I watched you sacrifice and work tirelessly for so many years so that the family could succeed. You showed me to never give up, be tough, soar with the eagles, and there can be more than one way to overcome a challenge.

For these things and much more, to the both of you, I am forever indebted. You both always pushed me to work hard. I appreciate you both for standing up for me, fighting for me, and believing in me even when I may not have believed in myself. Thank you for always telling me things that you knew was best for me, even when I didn't want to hear it, or didn't realize how important they were. Thank you for patiently listening to me talk endlessly about my classes, grades, and especially creativity. I thank you because you both taught me to be a life learner, never settle for anything less than excellence and to seek out answers to questions that I have about life and what it brings.

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## **SECTION ONE: INTRODUCTION AND PURPOSE**

### **Introduction to Section**

The purpose of this section is to acquaint the reader to the reasoning by which this subject matter was selected and its importance. Furthermore, the author delineates the background and meaning of the project.

### **Introduction and Purpose**

The dilemmas surrounding healthcare certainly are not new and can be a hot button topic. However some efforts have been made, especially in recent years to resolve the issues of providing care for the growing number of Americans uninsured, raising costs of procedures, prescriptions and the sustainment of a good quality of life for an aging Baby Boomer population. According to Anderson, Goodman, Holtzman, Posner & Northridge (2012), “over the past century in the United States alone, the proportion of persons aged 65 years or older increased more than threefold, from 4.1% to 12.9%” (p. 393). With a population this large and rapidly growing and with many living with multiple medical conditions it will be vital to have trained high caliber healthcare providers with creativity skills to support those in need.

Questions that have risen about how best to address these issues and others surround the most effective ways to implement quality healthcare commands new thinking to old problems. The qualifications to use creativity and the Creative Problem Solving process (CPS) requires one to own the challenge, that the challenge is complex, to have motivation to address the challenge, and that there can be multiple solutions to the challenge (Miller, Vehar & Firestien 2001). The issues beleaguering healthcare certainly meet this criteria. We as taxpayers, voters, care providers, policymakers, and citizens all own the challenges and can suffer the consequences for not accomplishing the goal of reform. There is certainly motivation for change as one can see



with the passing of the Patient Protection and Affordable Care Act in 2010. Other solutions have also been offered up which proves that the situations require imagination. The focus of this paper is to guide Human Resource Development (HRD) professionals in the application of creativity when training healthcare professionals. The following questions guided my training and research project:

- How to apply Human Resource Development and training in creativity to the healthcare domain?
- What are the impacts and benefits from the training?

The goal of this work is to create awareness of the bridge between Human Resource Development, training, and creativity. The project provides a learner guide for facilitators when delivering a training using creative tools and methods. Its goal is also to seek new strategies and improve the service of not just the utilization of the science of medicine, but also the mindfulness, understanding, and delivery of human care.

## **Background**

This work was also prompted from a very personal place. My parents, both Baby Boomers, each have multiple medical conditions. Through the years, I have watched them hospitalized for the maladies and ailments they have battled. Overall, they lead productive lives and are as healthy as they can be. However, in times of need of medical attention I have witnessed the struggles with concerns such as whether the insurance company would pay for a procedure or prescription, or receiving the bad treatment of a nurse. Growing up, my mother always wanted me to become a medical doctor. Her justification was she wanted me to be able to give back directly to people and to the community. While I share her reasons of *why* she wanted

me to pursue a career in medicine, my abhorrence of needles and the sight of blood promptly put an end to that dream. I want to give back to my community, just not by those means.

My experiences in the M.S. Creative Studies program through the International Center for Studies in Creativity at Buffalo State College strongly influenced and encouraged me to explore and seek novel ways to practice my creativity. My journey to the ICSC started in my junior year of pursuing my Bachelors of Science in Business Administration. I took an Organizational Development class, and my interest for training, facilitation, and consulting started. I wanted to assist others in meeting change. When searching for graduate programs to submit application for, I came across the ICSC and my curiosity was immediately piqued. My conversations with Professor J. Michael Fox sold me on applying for the program. He explained that with use of creativity and innovation, change can happen. While taking classes, especially the Designing and Delivering Creativity Education (CRS 680) in the Facilitation strand with Dr. Roger Firestien, my calling was confirmed. The decision to pursue training and facilitation really came to a climax when I gained the opportunity to train a class in Ekvall's Climate Dimensions with a co-facilitator at an insurance company that provides products and services for healthcare. I had found my passion! It was then that I realized that I could synthesize my education in both business and creativity to implement change in healthcare. Training, facilitation, and consulting would be the vehicle for me to make a difference. My intrinsic motivation has driven the research for this project and continues to be the determinant for my work in the creativity field. I found a way to be altruistic, give back to people which is the most vital resource that we have, and make my mother proud. My feelings are that if I am able to aide healthcare professionals directly with teaching them creativity and administering creative methods in training, then I am indirectly helping patients and others that the healthcare professionals support.

### **Contribution to Creativity**

What distinguishes this project from others is the focus on teaching healthcare and medical professionals the deliberate insertion of creativity to their domain. It is my belief that this project will spark interest in the creativity field from human resource development professionals and those in the medical fields alike. Articles and publications on the affiliation of human resource development and creativity have begun in recent years and will continue to grow. The need for creativity in healthcare has also been written about. Both the awareness and the necessity of creativity will too rise. This project will be one of many means to get creativity to be permeated into the field of medicine.

### **Summary**

The need for creativity in both HRD and healthcare is ever growing. Many Americans are either without insurance, underinsured or simply cannot afford basic medical care. In addition, as Americans are leading longer lives, the factor of having multiple medical conditions is growing. Furthermore, when receiving this care, patients require customer service. The patients many times are the customers and require a professional staff to be mindful of their needs and then fulfill those needs. HRD professionals can contribute to the integration of creativity and assist by incorporating it in lesson plans and teaching the skills and tools of creativity. The effect will be that healthcare professionals can be more positively impactful in the medical field.

## **SECTION TWO: PERTINENT LITERATURE**

### **Introduction to Section**

“Imagination and creativity are necessary in theorizing and practicing HRD” (Gibb, 2004, p. 72).

This section describes how creativity and human resource development are connected and the significance of that relationship. It will further explore the integrating of the two domains and the impact of that integration while training in the healthcare domain. In addition, the role of the facilitator and the benefits of training will be discussed.

### **Human Resource Development and Creativity**

“Creativity and HRD are connected through performance-related variables such as learning, motivation, goal setting, leadership, and job characteristics. These particular variables are discussed in both the HRD and creativity literature” (Waight, 2005, p. 156). The use of creativity tools and techniques in Human Resource Development (HRD), specifically training, benefits both the trainer and the participants in that it enriches the professional and personal endeavors of those who pursue the development of creative skills and want to utilize them in other domains.

Today’s workforce requires its workers to be able to problem solve and handle complex challenges on a constant basis. As a trainer, I have to engage the participants and promote creative thinking.

Gibb and Waight (2005) argued:

Creativity involves being able to produce solutions that combine both calculation and imagination and that are functional and beautiful and novel and useful. In this sense,

creativity is a capacity that draws on an appreciation of both objective science and subjective artfulness, requiring a combination of a quantitative and qualitative judgment (p.276).

Gibb and Waight's articulation of connectivity of HRD and creativity has prompted much of my "aha" moments of pursuing a career in training. According to Gibb and Waight, creativity is related to core HRD issues, such promoting individual, group, and organizational learning. This link to this type of learning focuses on critical thinking, interpersonal skills and emotional intelligence. It would be wise for HRD practitioners to familiarize and study the research on creativity and organizational culture/climate. Many can benefit from creating and supporting an organizational culture that supports creativity. Learning and development initiatives may be enhanced by creativity. Increasing the potential in employees to be creative is something that is critical to HRD professionals. Organizational performance can be improved when individuals take full advantage of these new creative abilities (King, 1998; McLean, 2005). The need for creativity and innovation in an organization's growth are important for several reasons such as increasingly competitive markets, and needs to improve competitive advantages (Roffe, 1999).

This connectivity of HRD and creativity may potentially be used in many domains. Healthcare would receive a positive impact if implemented in this domain. Healthcare is going to require innovation and creativity in order to continue its desire to change how the industry is run. A large part of that change is training employees to look at health care challenges through a different lens. Valenzuela (2012) stated, "Based on the current health care environment, incremental change will not suffice in making a significant impact in our country. Change must be on new, breakthrough models with both top-down and bottom-up leadership" (p. 35).

To give more support to this argument, Rethmeier (2010) stated:

Healthcare leaders at all levels must be willing to discard the thinking and behaviours of their past and to learn new ways to embrace the opportunities before them. Success in the future will require a combination of creative and critical thinking skills to help organisations 'rethink their thinking'. In short, meaningful healthcare reform depends on innovation (p. 1).

When training staff, Pynes & Lombardi (2011) further argued:

The ability to tap into the innovative and inventive traits of staff members is not only a management technique but also a motivational factor that needs to be mastered by all healthcare line managers. Education on encouraging workplace innovation and creativity can help transform managers' routine scheduled staff meetings into problem solving sessions in which new innovations are discussed, designed, and implemented (p. 313).

Facilitators are challenged to present and deliver concepts and ideas in alternate ways to learners. This is done to engage adults to critically reflect and consider alternate ways to think, behave, live and work. Those that do this are more likely to re-create their lives and redefine relationships.

Seward (2011) wrote on the benefits of taking risks and trusting instincts when training. His audience was doctors, nurses and others professionals in the medical field. The author stated that he challenged his attitude toward risk and decided to allow improvisation into his method of training. His former method was very structured and scripted, usually only using PowerPoint. By adjusting his style and removing self-barriers he not only gained more confidence, but was also able to focus more on the specific skills the trainees needed, and provide a more energetic, adaptable delivery of the material. In addition, by moving away from the script, he empowered

the trainees when he focused on the particular issues that the trainees wanted to gain knowledge on. According to Seward (2011), “By removing the boundaries of constraint created through my linear style of workshop, I was encouraging the delegates through my own creativity, to be more creative in how they live their lives” (p. 38).

### **The Role of the Facilitator**

The facilitator has been defined and described by many who have studied the role. As the facilitator of a group, he or she wears many hats and the role is complex. Schwartz (1994) argued, “The facilitator’s role is to help the group improve its process in a manner consistent with valid information, free and informed choice, and internal commitment to the choices” (p.10). To help guide the participants in change, the facilitator provides the process required to promote the change intended.

Being able to train participants to produce solutions and to provide tools to seek answers, benefit both the participants and those they solve a challenge for, such as a patient or medical professional. Facilitation alone does not change the participants’ behavior. Facilitators provide the process to participants to help make an informed decision to change. Once that decision has been made, facilitators help them learn how to transform to model actions exemplified in the training.

Schwartz gave a more detailed description of the role of the facilitator when he stated:

Facilitators need a variety of skills and abilities to fill their role, including accurately listening to, observing, and remembering behavior and conversation; communicating clearly; identifying similarities and differences among statements; understanding multiple perspectives; analyzing and synthesizing issues; identifying assumptions; diagnosing and

intervening on effective and ineffective behavior; providing feedback without creating defensive reactions; accepting feedback without reacting defensively; monitoring and changing one's own behavior while working with a group; developing the trust of clients; empathizing provide support and encouragement and having patience. This list is not exhaustive. But no list can capture the complexity of the facilitator's role (p.10).

Michael Galbraith (1991) studied facilitation and adult learning extensively. He stated that facilitators are more concerned with learners than about things and events. Galbraith also argued:

When facilitators and adult learners are engaged in an active, challenging, collaborative, critically reflective, and transforming educational encounter, a transactional process is occurring. Within this process learners are interacting with the facilitator and other learners, as well as with educational content, materials, ideas, values, and knowledge bases (p. 1).

Galbraith further stated:

The facilitator's roles are diverse because of the multifaceted nature of adult learning and the settings in which it occurs. Within a transactional process, and the content of the learning and its outcomes, the facilitator may be the challenger, role model, mentor, coach, demonstrator, content resource person, and learning guide (p. 8).

Musinski (1999) who studied teaching methods for nursing students offered an illustration of the differences between traditional teaching methods and facilitation methods. Peer groups who have the opportunity for open discussion offer a strategy that is irreplaceable to the facilitators as it encourages interdependence and enhances teaching and learning. The student



becomes self-directed. The mood and climate is set by the facilitator. By encouraging the student through coaching to become self-motivated, the facilitator is fostering and nurturing an ambiance that is conducive for learning.

**Figure 1. "People Learn More When They Are Having Fun"\***

Function	Traditional Teacher	Facilitator of Learning Instruction
Instruction	Directive	Assisted student-centered learning
Learning responsibility	Responsible for and assesses learning	Learner controls/directs and is responsible for own learning
Classroom style	Traditional rows of students facing teacher (captive audience)	Cooperative work/learning groups encouraged
Teaching methods	Didactic presentation with little interaction or regard for learner needs	Student assisted to locate resources with much interaction and creativity
	All teaching done same way for all students	Instruction done with increased awareness of varied learning styles
	"Telling" facts presented and answers necessary for learning are provided	"Asking" questions and situations presented to challenge critical thinking skills and creativity
	Strive to make students think like teacher	Respect learner's individuality and view experience as collaborative
Classroom emphasis	Learning	Doing
Transmission of information	Authoritarian	Democratic, uncritical, learner-defined activities
Quantity taught	All receive same quantity regardless of prior knowledge	If student demonstrates competency, material may be modified
Relationship to real life	Basis of teaching from text/lessons	Strive to relate to real-life situations (create need to learn)
Testing	Traditional paper-and-pencil tests	Assessment done in various, individualized methods
Educator/student relationship	No special consideration for individuals	Establish collaborative relationship with learner in positive, nonthreatening atmosphere
Philosophy	Serve only "felt" needs of student	Confirm student values and behaviors with critical analysis
Student self-awareness	Direct a dependent student	Assist student to achieve sense of self-actualization

\*Workshop handout (© 1998 by B. Musinski)

Figure 1: People learn more when they are having fun. (Adapted from Musinski (1999). Rowden (2000) stated:

Trainers should begin by viewing their function as one that does more than just increase skills, impart knowledge, or foster a change in attitudes; they must prove that people use the skills, knowledge, or attitudes to upgrade their job performance (p. 10).

Brookfield (1986) studied facilitation and adult learning. In his work, he found that participants are more willing to learn when they are self-directed, when their needs are taken into account and the climate is safe and conducive to learning. Learners' previous experiences also needed to be brought into the learning and the content that was being facilitated needed to be applicable to them in their personal or professional lives.

Brookfield also argued that:

In a more ambitious study, similar to Conti's researches, James (1983) devised the following set of basic principles of adult learning after a team of researchers had undertaken a search of articles, research reports, dissertations, and textbooks on adult learning (p.132):

- Adults maintain the ability to learn
- Adults are a highly diversified group of individuals with widely differing preferences, needs, backgrounds, and skills
- Adults experience a gradual decline in physical/sensory capabilities
- Experience of the learner is a major resource in learning situations
- Self-concept moves from dependency to independency as individuals grow in responsibilities, experience and confidence
- Adults tend to be life-centered in their orientation to learning

- Adults are motivated to learn by a variety of factors
- Active learner participation in the learning process contributes to learning
- A comfortable supportive environment is a key to successful learning (p.38).

### **Benefits of Training**

Aguinis & Kraiger (2009) examined over 600 articles, studies, books, and chapters in psychology, human resource development, human factors, knowledge management and human resource management. They found that, “The most effective training programs were those including cognitive and interpersonal skills, followed by those including psychomotor skills or tasks” (p. 453). This discovery directly relates to creativity as creativity has seven cognitive skills associated with the Thinking Skills Model of the Creative Problem Solving Process (CPS). Puccio, Mance & Murdock (2011) argued, “We have described CPS: The Thinking Skills Model as a cognitive model...because its function is to improve people’s thought processes so that they are better able to resolve predicaments or pursue opportunities that bring about productive change” (p. 70).

Parry (1996) discovered that the impact of training, when done well, can be long lasting. The accrual of benefits from the training can be projected one to five years after the participant has received the training. This is important both to the facilitator and the participants. Participants want to know what’s in it for them and the facilitator who plays a vital role in supporting the training wants to know if it is transferred to the learner. To begin the journey towards beneficial training, Ng & Dastmalachian (2011) argued that, “It is generally agreed that for training to be effective, (1) the trainees need to be motivated to learn, (2) the learning

outcomes are relevant to the needs of the organization and (3) there is transfer of learning” (p. 831).

Employee training is essential not only for the individual work performance but for them as a person to grow and succeed. Training is a strategic advantage for a business it creates and develops a culture within the organization. Businesses need to examine what exactly are the attributes of a good training curriculum so that it can effectively employ the program. Training has a specific goal to improve employee's capabilities, execution, and performance. Khan, Ahmed, Ibrahim, & Shahid (2012) reported, “The developing process of employee’s skills in order to improve performance is called training” (p.48). Training helps individuals to develop a clear view of their job. McGuire, Garavan, O'Donnell, Saha, & Cseh (2008) demonstrated, “Training and development can improve an individual’s level of self-awareness, enhance and individual’s skills or increase an individual’s motivation on the job” (p. 336). Farooq and Kahn (2011) stated, “Training has been the main factor for influencing the employees’ skills, abilities and attitude” (p.23). Khan, Ahmed, Ibrahim, & Shahid (2012) stated, “Training plays a vital role in the betterment of worker and over all productively of organizations” (p.56). Training is essential not only to increase productivity but also to motivate and inspire workers by letting them know how important their jobs are by giving them all the information they need to perform these jobs.

From a facilitator’s perspective, Henville (2012) argued that, “Looking at behaviors rather than processes enables learning to be transferred back to the workplace” (p. 42). Participants will be willing to engage in the learning if they are given the opportunity to exercise and utilize what they have learned. The sooner the participants are able to utilize what was taught the better. A work environment that is conducive to the allowance to make mistakes and for

them to be tolerated will encourage the participants to try out what has been learned. Having a similar work environment to that used in training, creates a supportive climate for new skills performance. Supportiveness is essential and has a substantial effect on whether the new skills are applied. When there is autonomy and leeway in how to do their job, the transfer of learning can happen as well as the realization of training (Levi, 2011; Shalley, 1995). Adults require the opportunity to practice what is taught soon after they receive new training material. In addition, they need to believe that they can improve and be recognized for what they learned and have been taught (Murray & Gill, 2012).

This line of thinking has a direct tie to creativity. In the Creative Problem Solving process, when generating ideas to solve complex issues the allowance to make errors offers opportunities for new ideas to be generated to resolve the problem.

Firestien (1996) supported this when he stated:

How can you move toward mastery in leading on the creative edge? One big key is to value mistakes. Don't be afraid of them. If you aren't making mistakes, you aren't trying anything new-which means you're stagnated. And that's never a good thing in the highly competitive business world of today. So keep trying. Encourage your employees and coworkers to keep at it. Create an environment that encourages the taking of risks.

Reward people for their efforts; don't punish them for their failures. That's when breakthroughs take place (p.184).

Employees who are trained become more engaged with their work because they now see the meaning and purpose in the work. Training also increases efficiencies in processes, resulting in financial gain. It is imperative for businesses to offer up to date training to their staff due to the ever changing demand of the medical field. Businesses in the healthcare field have much to

gain in keeping their competitive edge by building a learning workforce. Most employees want to be valuable and remain ambitious at all times. This can only be achieved through employee training and development. Employees will always want to develop career-enhancing skills, which will always lead to employee motivation and retention. Through training, employees are learning either new things which are relevant to their job or they are learning how they can do their job more efficiently. There is no doubt that a well-trained and developed staff will be a valuable asset to the company and will increase the chances of efficiency in the workplace.

### **Summary**

The connection of human resource development and creativity can positively give impact to the participants and provide benefits of training. The facilitator is a key and critical instrument in achieving this goal of beneficial training. By acting as a coach, and asking questions to challenge participants, the facilitator can be a guide to a greater, more enriched learning experience for the adult learner. The healthcare field is a constant changing environment with new developments in technology, and new discoveries of ways to keep people healthier, longer. Utilizing facilitation skills and integrating creativity in the healthcare domain are crucial for organizations to be a step ahead of competition. Benefits of training can include a well trained staff, the application of the CPS process resulting in an improved work performance.

## **SECTION THREE: RESEARCH PROCESS**

### **Introduction to Section**

The purpose of this section is to identify the methods and actions used to deliver the research process. The author describes methods determining the techniques to be used to deliver the training class.

### **Research Process**

Research was initiated and conducted in a three month time span. An introductory meeting was scheduled. The introductory meeting served the purpose of giving me a chance to meet and greet the client in person, as the only points of contact previous were by several telephone conversations and email correspondence. In addition by this time, the entire PowerPoint for the class (Appendix A) was created to conduct a thorough review by the Director of Human Resources. My meeting with all the managers was as a guest at the manager's meeting two weeks before training delivery at the Hospital to allow the managers an opportunity to ask any questions that may have arisen regarding the content and delivery of the class. The class was delivered twice daily for one week. The class sizes ranged from as small as five participants to as large as fifteen participants, for a total of seventy-four employees engaging in the workshop. The closing meeting and participant feedback results were provided to the client three weeks after training delivery. The challenge about the Customer Service training workshop initially was to create and submit a proposal to the potential client. The purpose of the proposal was to show the client the benefits of training in customer service excellence, the use of creativity to help implement the training and small class sizes during delivery.

The material used to create the class include the combination of the author's own work experience of being in the customer service field for over 14 years, creativity literature, and human resource development (HRD) literature. During the review of the creativity literature and HRD literature, it became apparent to the researcher that the fields had commonalities. The goal was to find out if the related fields could be effective when training is delivered in the healthcare domain.

To ensure that I had time to arrange the physical environment conducive to what was going to be trained, I scheduled an appointment to meet my client, the HR Director, a few days prior to the training class. I wanted to have a walk-through of the training class.

At the front of the room I put one long table and two chairs at each end to provide space for me. The tables for the participants were arranged in a deliberate manner. Originally, the room had three rows of tables, three tables across. I changed them around so there were three clusters. I took two tables to form one large one and have four participants sit at it, facing each other. I repeated this two more times, so that there were three clusters of tables. The remaining table and extra chairs were moved to the far left side of the room. Figure 2 and Figure 3 are pictures of similar training settings in which the training was conducted. Figure 2 is a how a typical training room looked at the organization before any changes. After what I has studied and learned at the International Center for Studies in Creativity (ICSC), I have learned that physical environment can impact the effectiveness of training and transfer of training.

Figure 3 was an illustration of how I designed the room. The tables were moved for a few reasons. First, I wanted the participants to face each other and form as a group and team throughout the process. Second, I wanted them to have all the access to view the PowerPoint slides and the two flip charts that were at the front of the room.





Figure 2: Training room setting before changes ([cic.roomzilla.net](http://cic.roomzilla.net))



Figure 3: Training room setting after changes ([cpag.org.uk](http://cpag.org.uk))

Schwartz (1994) supported facilitators changing the physical environment and making it more conducive for training when he provided gave four principles. He stated:

1. All participants and the facilitator should be able to see and hear each other.
2. The seating arrangement should enable members to focus on the flip chart (or other writing device) and the person or persons who will manage the group's process.
3. Seating arrangements should distinguish participants from non-participants.
4. Seating arrangements be spacious enough to meet the needs of the group but not larger (p.146-148).

For the workshop, there was no assigned seating. If participants who were in the same department sat next to each other, they were separated. The purpose of doing this is to attempt to have participants establish new relationships with colleagues that they may not have had an opportunity to do before. I wanted that to transfer to after the training was complete so that the established relationships would help in working together in the future.

I also ensured that the room was spacious but not too empty. I wanted to provide an inclusive atmosphere. This is why the tables were positioned to have the participants face each other.

When people where choosing seats, I ensured that the table would be filled and not leave someone sitting at a table alone. This was done deliberately as the intention of the class was to bring people together to work. If there was someone sitting alone, it would have caused an unnecessary psychological distance. In addition, during the class, if I wanted to get consensus on a point from the group, it would have been difficult to do so if they were too spaced out.

In addition to preparing the physical space, I also prepared myself. I created a script for myself that was connected to each of the slides. This script was simply a guide and not written word for word. Since the workshop was only three hours, I wanted to make sure that I stayed on

topic as much as possible. After the training room was set up, I began to conduct a “dress rehearsal”. I walked around the room and stated my script as if I was delivering the class at that time. I needed to get comfortable and confident with communicating and delivering the training to others. Going through this process, I was able to find adequate places to pause when speaking to provide emphasis on a point being taught.

To begin each training session, I was introduced by the HR Director of the Hospital. I then introduced more about myself. I articulated my passion for customer service, stating that I have been in the field for over 14 years. I then explained that I am a graduate student at Buffalo State in the Creativity program concentrating in Facilitation and Training. I wanted to give credibility and build trust between me and the participants. I asked the participants to go around the room and introduce themselves, tell the group the department they work in, and who their favorite superhero was and why. This was deliberate for a few reasons; I wanted to begin to establish a safe psychological environment for the participants. I wanted them to connect something they could relate to, to the material that was going to be delivered. In addition, it was downright fun to ask! The topic was customer service, so I bridged the superhero analogy to the service of people. During the opening discussion, I offered traits of a superhero such as responsibility, sacrifice, bravery, going over and beyond, considering others’ needs, strong moral code, and determination to succeed in the midst of adversity. Then I related these same traits to the various roles the employees perform daily at the Hospital and how the person receiving service from the employees may view them as superheroes. I challenged them to instill these traits within themselves. I also wanted them to learn more about the people that they each support. In doing this exercise, I wanted to start where *they* are, not where *I* was. The energy level of each class varied. If the class was lively and clamorous, I showed them my lively spirit

and then brought them to a level that was more appropriate for the next learning activity. If the class was more quiet and reserved, I too would begin the class that way, but would eventually move them to be more energetic at appropriate times.

### **Objectives and Learner Benefits**

After the introductions, the Learning Objectives were reviewed. To have the participants be active in their own learning, I asked them what they wanted to get out of the class. As they offered matters that they wanted improvement on, I wrote them on flip chart paper for all to see. Once completed, the list of Objectives were posted and revisited after the class to see if they were met. If there was an Objective that was not relevant what was going to be taught in the workshop, I acknowledged the learner and advised that it was not be part of the focus of the workshop and would not be discussed. I did explain that it could be written in what became the “Parking Lot”. The Parking Lot was a flip chart sheet specifically for a list of Objectives, questions and other comments that the participants may have had that were important, however would not be covered at that time. After I received the participants’ Objectives, as the Facilitator, I examined the Objectives that I put together for the workshop.

The Objectives I created for the workshop are as follows:

- Define exceptional customer service
- Identify the benefits of consistent superior customer service
- Identify the needs and expectations of internal and external customers
- Obtain tools to handle difficult customers
- Develop a personal action plan to improve customer-service skills within work environment

After the overview of the Objectives, I immediately spoke in-depth about the Learner Benefits. This was to answer as soon as possible, the “What’s in it for me?” question that many adult learners have. The Learner Benefits that were aimed for during the workshop are as follows:

- Present the organization in a positive, professional manner
- Use positive "can do " language to assist the customer in person and on the phone
- Telephone etiquette and call control
- Show consistency in service provided
- Utilize listening skills
- Build rapport and trust with the customer
- Have Fun!

### **Activities**

There were many activities incorporated throughout the workshop to involve the participants. While all of them are not described here (to see all of the activities, please refer to Appendix A), it is important to highlight some of the ones used to communicate the application of creativity. The first activity was for the participants to partake in putting a puzzle together. The exercise was to get the participants to begin thinking about supporting one another during a task, trust, one’s approach to challenges and how they view them, communication, problem solving, leadership, followership, and understanding that if one piece of the puzzle is not where it belongs, the picture is not complete. This translates to the participants in stating that everyone needs to be focused in their particular roles in the Hospital, understand its importance as well as the importance of others.

The next task was to first reflect and think of a definition of exceptional customer service. This exercise was place in because not all of the participants were comfortable with speaking

out, so I wanted to allow an avenue for those who were more introverted to express themselves. After each participant wrote his or own individual definition, they interacted with their tablemates, synthesized the definitions, and elected a representative who reported back to the class. To gain an understanding of what excellent customer service meant to them and to learn from their peers is the reason this activity was included.

To gather the group during break, I engaged the early returners on pleasant topics such as the weather, sports, a unique positive current event, or just ask how their break was. At about the half-way point of the break, I set myself up for the next segment. I then began modeling behavior of being prepared to continue the class by sitting in my seat at the front of the room. These behaviors help me reconnect with the participants before launching to the next segment. In addition, there was instrumental classical music played throughout the break. This was a calculated move to attempt to keep the participants engaged and open to learning, even during the breaks.

After breaks were completed, I reviewed with the class the previous section taught. This was a chance for the participants to ask questions that may have risen and the break time used was a chance to incubate on what was taught. After clarifications were answered on topics taught, I felt the class was ready to move forward. When moving forward to the next segment of training, I often attempted to challenge the participants by asking questions related to the material.

### **Follow-up Meeting**

After all of the workshop sessions were completed, I compiled the data on the feedback forms that the participants completed. I then analyzed them to examine and determine to my client, the HR Director suggestions for future trainings. The participants also voiced a need for

various subject matter when offering Objectives in the beginning of the class. Many participants gained a positive learning experience from the workshop based on the written and verbal feedback provided. What they wanted to see more of was training in three subject matters, conflict management, stress management and diversity training. These requests were communicated verbally at the beginning and end of most of the sessions. Since this was the case, as a the HR Director was my client, I felt it to be my duty to explain to him what the participants' needs were, whether I would be chosen to assist in fulfilling those needs or not.

### **Summary**

Research for the workshop took place for the workshop for three months. The delivery of the workshop for approximately seventy-four participants was completed in one week. Preparation involved restructuring the physical environment and doing a “test run” through the material to ensure all pertinent points of information were going to be communicated. In addition, I made efforts to connect with the participants to build credence so that the training would be effective. This was done by meeting the participants where they were in their energy level and then guiding them accordingly through the training. I also encouraged active participation by granting ownership to learning when the participants the opportunity to express Objectives, what they wanted to learn. Most importantly, I provided the purpose and the ambition of the workshop to give rationale as to why it was being delivered. I was mindful of threading creativity into as many activities as possible. The deliberateness of this was evident in the dissemination of training. Finally, after all the sessions were completed, I met with the client to verify if needs were met and offered some recommendations for future workshops based on participants’ feedback during and after the sessions.



## **SECTION FOUR: RESULTS AND RECOMMENDATIONS**

### **Introduction to Section**

The purpose of this section is to provide the reader essential information on what the author ascertained in the process of training. In addition, the author suggests recommendations and works to read for future delivery of training.

### **Key Learnings**

#### **Preparation is Key**

A key learning that I had was that as a trainer and facilitator: one can never be too prepared. When participating in the facilitation with the Hospital, I took great pains to ensure that the space was properly prepared for the following week's meeting. I did this by redesigning the layout of the room. Moving the tables to face each other in groups was more conducive for learning for the participants. In addition to preparing the space, I also discussed several times with my contact at the Hospital what the flow of the workshop would be. The day I met with the Director of Human Resources, I did a practice run to get a flow of the class. Being prepared helped me to remain calm and worry free. I deliberately wanted to attend to the thoughts, feelings and sensations of the participants. I truly believe that I was exercising Mindfulness when creating this training session.

#### **Knowing Your Audience**

The training took place at the Hospital, in one of the training rooms. The workshop was prepared as a three hour long session. This workshop was delivered two times a day for one week. This was a total of ten times. There were approximately 80 participants overall. This

workshop was considered a mandatory event by the CEO that all employees were required to attend. My audience was a group that had never been exposed to creativity before.

Understanding this information aided me in structuring the class. For example, there are actually two warm-up exercises in the beginning of the class.

### **The Gift of Giving**

When accepting the assignment to work with the Hospital, I was primarily looking at what I could gain (experience, practice in training and facilitation). I have come to realize that it is I who is giving. I understand the purpose of the assignment was to gain facilitation experience and skills, but by helping with the challenges of the health center, I am not only gaining that experience, I am giving back to the community and doing volunteer work. That, I believe is the greater reward. The process of creating the workshop and providing assistance to a facility that is willing to give medical care to anyone in the community, regardless of ability to pay, was truly a transformational experience. I hope to be a beacon for those within the International Center for Studies in Creativity to show that this is a way to truly ignite creativity around the world.

### **No Cookie Cutter Training Delivery**

When I delivered the workshop, I needed to be cognizant of where my audience's energy level was. It required me to put my preferences aside to be sensitive to theirs. This compelled me to stay alert and be ready to adjust the material in a moment's notice to cater to their needs. No two sessions were delivered exactly the same. There were some sessions that required more discussion on certain topics than others. In this regard, I am thankful that I learned to be Tolerant to Ambiguity and that I did not force the classes into what I had scripted, but rather I was flexible in adapting to fulfill what the participants felt was lacking in their knowledge base. In addition to acclimating myself to their learning needs, I also did so when it came to the usage of technology

to deliver the workshop. On the second day for my morning session, I did not have computer access in the training room to run the PowerPoint. Instead of getting upset about the situation, I was able to easily transition to utilizing the flip chart to facilitate. Since, I already had a printed copy of the Power Point; I then made copies of the images that I wanted the participants to see at key speaking points. Overall, this session ran just as smoothly as the others.

### **Results**

The results of the training were that many of the participants felt they learned how to better provide customer service in the Hospital. According to the most engaged in the learning, the material was relevant and the facilitator very informative.

### **Recommendations**

Based on reflection of my experience, the following actions are what I suggest to the reader to provide a more enriched facilitation and training experience:

- Be more organized with time
- Remain calm when time is a constraint when training
- Be more assertive during client meetings regarding client's needs, for example explain that a longer session may be needed to deliver what the client requests
- Hold confident posture and body language
- Remain positive
- Be aware of nonverbal cues that are conveyed to the audience
- Build trust with both the client and the participants to ensure transfer of training
- Have a follow-up action plan and meet with the client to assess success

- Get comfortable and knowledgeable with the material being delivered, so much so that you are the expert in the room
- Focus on the needs of the client; remember what the client objective is
- Own your space; know where all your flipcharts, markers, PowerPoint, and any other materials are in the room to command the physical environment
- Allow for silence during the session; often the participants are absorbing the question asked and require a moment to respond. Give them that psychological space to answer
- Make sure that you are not only debriefing the participants after an activity so that they gain knowledge and understanding of what took place; debrief yourself after the full session so that you too can learn from the experience
- Watch other facilitator and trainers; ask yourself questions, like, “What are they doing that I could be doing or not doing when I am training?”
- Ensure that the activities prepared meet the needs of the participants; if not be prepared to change them
- Understand group dynamics; have the ability to use that understanding to manage the group.
- Have the ability to juggle multiple ideas in your head, bring them together succinctly and play them back to the group; the ability to summarize the group’s progress towards the goals.
- Have the ability to manage conflict should it arise
- Allow for playfulness and novelty

- Provide guidelines in the beginning of training sessions, reinforce them during and reiterate them at the end to continue the bridge of trust between the facilitator and the participants

### **Summary**

There are many things that can be learned when facilitating. Such things as preparation, knowing the audience, knowing your material, understanding the impact of the training, and having flexibility in delivery are essential to success as a trainer. A facilitator using creativity skills when delivering training and teaching creativity is offering many life skills such as problem solving to those receiving it. Understand that there is just as much to learn from the experience of doing the groundwork in getting ready to facilitate and train as it is from the participants when delivering. This helps a trainer to develop the skills necessary to provide an outcome that is beneficial for all. Applying these competencies in the healthcare domain would assist in relieving some of the concerns that plague it and open the door for new medical technologies, procedures, medicines, and improve interpersonal skills when assisting those in need.

## SECTION FIVE: Conclusion

My experience in conducting the work for this project has expanded my knowledge in creativity, my zeal to apply all that I've learned in creativity to human resource development and medicine. The uniqueness of the project allowed me the chance to test my skills as a trainer/facilitator/ consultant, having to go through the process of bidding for the job, to conduct the training, to finally consulting the client in suggesting workshops to conduct in the future. This is important to me because being a trainer and facilitator is where I see my career path advancing.

Curiosity is what brought me to the Creative Studies program and it helped direct my learning. I was always asking questions and seeking to find out more. Earlier in this project, I asked two questions that I was seeking answers for. They were:

- How to apply Human Resource Development and training in creativity to the healthcare domain?
- What are the impacts and benefits from the training?

This project afforded me the advantage of learning that creativity has connectivity to human resource development. Knowing this, I believe will enhance the emerging fields of human resource development and creativity. By delivering the training using creative techniques the *transfer* of learning is greater. This leads to the second question, which asks about the impacts and benefits to training. Having creativity integrated into the human resource development domain to train those in medicine can potentially help to save lives, provide a better quality of life and life sustainability.

Finally, I leave the reader with questions that arose during the investigation into the research and conducting the project that remains unresolved with this project was:

- In what ways could this type of training be utilized in other domains?
- What would the impact and benefits be of integrating creativity for other domains into training?
- What differences would there be in delivery of this training class when implemented by a different facilitator?
- How might the International Center for Studies in Creativity (ICSC) utilize this information to build training programs specific to domains?

I urge the reader to go out and allow curiosity to drive one's learning and seek answers to these important questions.

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## **Appendix A-Facilitator Learner Guide**

**Would you do  
Business with you?**

Training for Customer Service  
Excellence

Facilitator Learner Guide

**Facilitator script:**

- Facilitator begins discussion by asking the question on the title slide- Would you do business with you? as a rhetorical question. Ask that the participants think about the question and be honest with themselves if they would or not and why. Explain that the class will be an overview of customer service excellence.
- Facilitator introduces his/herself to the participants, provides background and knowledge in the domain of training and development, customer service, and creativity.
- Facilitator advises participants to ask questions during the training and encourages discussion.
- Facilitator gives the logistics as to where things are, for example if a participant needs to use the facilities, state where they are located.
- Facilitator explains the purpose of the toys on the table, to help keep the participants engaged in learning.
- Ask the participants to place name badges on and introduce his/herself to the rest of the class, in addition the participant is to state a fun fact about him/herself colleagues may not know and who a favorite super hero is and why.
- Facilitator ends this part of the conversation by revealing who his/her favorite superhero is and why. Facilitator then deliberately connects the characteristics of the superhero to the job of customer service in the healthcare domain.

**Facilitator notes:**

- The purpose of the facilitator introducing themselves is to show the participants that the facilitator has credibility and experience to provide training.
- The participants are introducing themselves to begin dialogue amongst each other and forming as a group.

- They are also providing the fun fact as an effort to strip away titles and play on an even playing field during the training.
- The toys that are provided on each of the training tables are there to promote novelty, creative thinking and to engage the participant.
- The reason a super hero is requested is because it again helps set the environment that the training will be fun, engaging and an attempt to create a safe environment. Additionally, the participant can relate to the superhero chosen and attach the same characteristics that are used when the hero is helping or saving people to the jobs and functions that he or she performs. Examples are commitment, strength, and sacrifice.

**Facilitator Reflection:**

- This was a great way to open the training sessions.
- I noticed the participants were more relaxed and open to learning after introductions; lots of smiles and laughter when expressing favorite superheroes.
- Participants immediately saw the connection between the superhero exercise and the material that was going to be delivered; they expressed this by nodding their heads in agreement and stating things, like, "yes" and "this makes sense" when similarities were raised in conversation.

## Learning Objectives

- Define exceptional customer service
- Identify the benefits of consistent superior customer service
- Identify the needs and expectations of internal and external customers
- Obtain tools to handle difficult customers
- Develop a personal action plan to improve customer-service skills within work environment

**Facilitator script:**

- Prior to showing the Objectives slide, ask the participants what objectives they would like to get out of the class.
- List them on a flip chart.
- State to them that you will go back to the flipchart at the end of the class to see if the participants' objectives were covered.
- State to the participants that you as the facilitator are encouraging dialogue between you and the participants during the training.
- Encourage them to get involved and remind them that each one is responsible for his/her own learning.
- Show the Learning Objectives slide and do a brief overview of each of the bullet points to give deeper understanding.
- Ask the question to the class- Who are your customers?- Lead a discussion about who internal and external customers are.

**Facilitator notes:**

- You are to ask the participants what they would like to learn today with regard to the class because you want them to have a voice and a sense of ownership in the class.
- Going back to review what the class' objectives shows that not only did you attempt to align the material to what their needs were, you cared about what they wanted to learn.
- The purpose of analyzing the objectives that the facilitator created shows the class what learning the facilitator wants to the participants to walk away with.



- Help create the safe learning environment by explaining that the facilitator encourages the participants to learn from each other. This also will aid in developing a team atmosphere amongst the participants.
- Leading the discussion about who internal and external customers are sets the tone as to who the participants are providing service for. The patients are not the only customers. Each participant is both a customer and provider to each other. Departments support each other internally. In addition, the emphasis was to get the group to understand that any vendor, any visitor, any person that comes in contact with the Hospital by phone, in person, by mail should be considered a customer and handled with the utmost professionalism.

**Facilitator reflection:**

- The participants raised some very relevant learning objectives that pertained to their job functions
- When there were objectives that were valid to learning, but not to this class, in the future, they can be handled better by stating something like, "That is a great objective, however the material today will not cover it. We can place that in the 'parking lot' (a flip chart assigned specifically to list unanswered questions raised in class to answer at a future date) and gets some answers for you after the class has ended." By stating this, this tells the participant that although the question may not be answered during the class, the participant's concerns have been validated and will be addressed at a time in the future.
- Overall a positive experience for both the facilitator and the participants.



## Learner Benefits

- Present the organization in a positive, professional manner
- Use positive "can do " language to assist the customer in person and on the phone
- Telephone etiquette and call control
- Show consistency in service provided
- Utilize listening skills
- Build rapport and trust with the customer

*Have Fun!*

**Facilitator script:**

- Show the slide and begin a discussion with the participants about the benefits of learning about customer service excellence.
- State to them that performing these behaviors gives the output of creating a better workplace, increase happiness for self and the customer, improve personal satisfaction in work performance, and the employee will be more effective on his or her team.


**Facilitator notes:**

- For adult learners, they need to understand and have an answer for the questions What's in it for me? and Why am I here? This slide helps to answers those questions.

**Facilitator reflection:**

N/A

## Human Puzzle Exercise



Each participant must find a person with a piece that matches theirs

10 Minutes  
For the group to put the puzzle together

**Facilitator script:**

- Hand out puzzle pieces to the group. (Make sure puzzle has a small amount of pieces or the activity could take too long). An example is to use a 24 piece puzzle for a class with up to 8-10 participants. If the class is larger, use 2 puzzles that each have 24 pieces. Each participant should have 2-3 pieces each.
- Each participant must find people that have pieces that link up to their own.
- Eventually the whole group should come together to complete the puzzle.
- After the class has announced that they have completed the task, begin to debrief them.

**Debrief:**

- What went on, what happened? Ask who would like to volunteer to share his/her experience in the exercise. Who else? Limit to 3 people.
- What struck you about that? (Whatever the 3 experiences were)
- What does that suggest to you about yourself or the group that you worked with?
- How might we relate this exercise to our job functions?
- What other learning might we draw from this experience?
- Finish the debrief dialog by connecting the exercise to the learning material. Explain that as employees, we are all important “pieces of the puzzles” when creating a positive customer experience picture.

**Facilitator notes:**

- The purpose of doing this is to warm the group up and to get them talking and

interacting.

- It is also to show that everyone's role is interdependent for job success and to have a positive customer service experience.
- To show that everyone is important

**Facilitator reflection:**

- This was a great way to watch and monitor the participants to see how they displayed behaviors of working as a team.
- This facilitator found that the participants immediately found connection from the warm up to his or her daily job functions.
- The facilitator needs to be adaptable to changing conditions- 1 of the sessions had as many 20 participants when only 12 were scheduled to attend. Be prepared to still deliver the class with quality. Have more than enough resources with you in the event your class becomes larger than originally planned.

## Exceptional Customer Service Means to you...

Jot down your definition of  
exceptional customer service.  
(what do you think of when you  
think of when you hear the  
words “customer service”?)

**Facilitator script:**

- Present the slide to the participants. Ask the class- What does exceptional customer service mean to you?
- Ask them to think about their own experiences they have had when they received excellent customer service.
- Ask the participants to take 2-3 minutes to write down their personal definition.
- After writing their personal definition, the participants at each table is to take 3-4 minutes to share each definition hold a brief discussion, and elect a representative from each group to report back to the class. Allow 1-2 minutes for the representative to speak.
- After the time has elapsed, call the attention of the class back to you and begin to go to each table and ask each representative to report back.
- After you have completed the process of calling on each table, continue to debrief the exercise.

**Debrief:**

- We are going to list some qualities of exceptional customer service, what are they? (list them on a flip chart for the whole class to see)
- What do you see common about these qualities?
- Why do you feel these qualities are exceptional?
- Are there any areas in your job that you feel could improve to incorporate some of these qualities and make it easier for a patient/customer to do business with your company?

- What are they?
- Now ask the class to think about bad customer service experiences and list some of the qualities of bad customer service on a flipchart for the whole class to see.
- Ask the class- How can we prevent from performing bad customer service?

Finish the dialogue by stating that the best customer service does more than fix what's broken; it prevents the problem from reoccurring in the future.

**Facilitator notes:**

- The purpose of this is to get the participants to have an understanding of what excellent customer service is, not just service that is expected. If they are to perform it, they first need to be able to define it.
- The facilitator also wants the participants to continue to form as a team, because when they leave the training, they need to work together as a team.
- Also, the purpose is for the participants to begin to understand what it takes to provide excellent customer service.

**Facilitator reflection:**

- The participants found commonalities in each of their definitions.
- A lot of them talked about putting energy and enthusiasm into interactions with customers.
- They often felt that excellent customer service is sometimes hard to get and challenged themselves to perform it on a more consistent basis.



## Why is Excellent Customer Service Important?

- Builds reputation and Brand
- Accountability
- Builds relationships/respect
- Customer retention/repeat business
- Continuous improvement of the company
- Promotes job satisfaction for the employee/better morale
- Ability to manage stressful situations more effectively
- Consistency in service



### Facilitator script:

- Show the question only and ask it to the class. Hold a dialogue with the class and ask them to state why it is important to them.
- Ask the question, what are the outcomes of excellent customer service and why are they important?
- Encourage them to say more reasons, by asking-Why else?
- Ask the participants to state what the Hospital's core values are. In the actual training at the Hospital where this was delivered, there are 4 core values. They are: quality, integrity, accountability, and diversity. It was explained that if the participants were living and working by these core values- what the organization believes in, then they were providing excellent customer service.
- Show the list of the reasons that are bulleted on the slide and read them all.
- Provide a personal example of receiving excellent customer service and coming back for more. During the actual delivery of the training, the facilitator gave an example of driving 20 minutes across town, out of the way for the service of a specific tailor, when there were 2 tailors that were more convenient in location closer to home. The reason the facilitator drove the 20 minutes to this specific tailor was because the tailor consistently provided superior customer service and stood by the quality of her work.
- Close the dialogue by stating that explaining that it is excellent service, not just healthcare that will bring people back over and over again.
- Explain that every contact with a customer is an opportunity to enhance the image of the Hospital and its relationship with the customer. Encourage the participants to seize every opportunity presented to them to not only meet customer expectations, but to

exceed them.

**Facilitator notes:**

- The purpose of this is for the participants to understand the value of providing excellent customer service and not just because it is in their job description.
- To get them to have a better understanding that excellent service can directly effect the bottom line. If great service is performed, there will be repeat business. However, if poor service is performed over time, business can be lost.
- Another reason for this slide is for the participants to understand what its organization's core values are.

**Facilitator reflection:**

- This was a great slide to explain to the adult learners why they were in the class and what the outcome of learning would be.
- There was excellent and active interaction between both the facilitator and the participants.
- It was here that participants expressed experiences that could assist other participants in learning.
- Although few knew by heart the core values of the Hospital, the participants appeared to be willing to learn and embrace them.

## Greeting the Customer

**When answering in person: "**  
Welcome to (fill in the name of the organization). My name is (fill in your name). How may I help you?"

**Facilitator script:**

- Show the slide and request that the participants state the greeting aloud.
- Ask the participants to think about how they greet a guest coming into their home and if they were to use the same positive tone of voice, it would inflect warmth in their tone when speaking.
- Encourage the participants to use eye contact and smile when greeting a customer.
- An example to use is the Wal-Mart greeter. Discuss how the greeter has a welcoming behavior and body language when a customer enters the store. Explain part of the reason that the greeter does that is because the customer did not have to choose Wal-Mart to spend money at, but he or she did.
- Explain that same concept applies in healthcare. The customer did not have to choose this Hospital. He or she could choose other healthcare options, but they chose the Hospital, so be thankful and express that to the customer. The customer appreciates that you recognized the choice made.

**Facilitator notes:**

- The purpose for this slide is to provide consistency in addressing customers in person. It brands the organization, and provides the customer the name of the person that would be assisting them.

**Facilitator reflection:**

N/A



## Telephone Etiquette

- Answer the phone
- Address the Caller properly by his or her title
- Be Respectful
- Speak clearly. Use your normal tone of voice when answering a call
- Do not use slang words or poor language
- Never use swear words
- Do not eat or drink
- Listen to the Caller and what they have to say
- Be patient and helpful
- *Smile!*

### Facilitator script:

- Show the title only and ask the participants what are some of the keys to good telephone etiquette.
- Allow the participants to dialogue and provide answers.
- Encourage them to answer by asking- What else is important in telephone etiquette?
- Show the rest of the slide and read the listed bullets.
- Explain that the reason the word "smile" is enlarged is because one's attitude goes a long way.
- Explain that a caller can "hear" your smile in the phone and that during calls, it can be a way to diffuse potential challenges with the caller.
- Further explain that one's attitude comes across in 4 ways:
  - Text- what you say
  - Tone- how you say it
  - Smile
  - Timing- the rate at which the message is conveyed

### Facilitator notes:

- The purpose of this slide is to explain some of the do's and don'ts of etiquette while on the phone in a business.
- Another reason is to continue to change the culture of the Hospital and provide proper ways to utilize a business phone.
- Yet another purpose is to explain to the participants that when the phone is ringing, that it is business calling and not a nuisance.

### Facilitator reflection:

- The participants seem to be accepting of the list. They expressed this both in body language and by stating approval.

## Telephone Etiquette

- **When answering the Call:** "Thank you for calling (fill in the name of the organization). My name is (fill in your name) how may I help you?"
- **When placing Caller on hold:** "May I place you on hold?(allow for the caller to respond) Thank you."
- **When closing the Call:** "Thank you for calling (fill in the name of the organization).

### Facilitator script:

- Show the slide and read over each bullet. Have the participants state the greetings aloud to get them acclimated to it.
- Explain to the participants that it is important to the caller that where they have called is identified so they know that they have called the right place. It is important for the employee to identify where the caller has called to brand, or stamp the organization.
- Explain the importance of warm transferring calls within the Hospital when ever possible. Explain that many callers do not like to have to repeat the purpose of their call multiple times. It frustrates the caller. Introducing the call prior to transfer eliminates that.
- If the employee can handle the situation and call the other department on the caller's behalf, then that should be done in place of transferring the caller.
- The facilitator should express the importance of thanking the caller at the close of phone call. It is a reminder that the caller chose this Hospital instead of any other healthcare facility and it is appreciation expressed for the business.
- Remind the participants that when answering the phone, the employee has 30 seconds to make a great 1<sup>st</sup> impression.
- Explain the importance of having all computer systems and other tools up and prepared to be used prior to the call. Explain that asking a caller to wait while you sign on to a system you need to investigate their inquiry is unfair to them.
- The Facilitator should describe in detail that, when doing research or getting the answer for the caller and it does require the caller to hold, the employee needs to explain that the hold is necessary, why, and for about how long it will be. After about 30 seconds to 1

minute, the call should be “refreshed”- get back on the line, thank the caller for patiently waiting and explain that the inquiry is still being looked into.

- If the research takes more than 5 minutes than take the caller’s contact information and promise to call back. Provide an approximate time frame for the follow up to manage the caller’s expectation. Attempt to exceed that expectation.

**Facilitator notes:**


- The purpose of this slide is to explain to the participants how to better manage their calls. Call control is very important in a business environment.
- The participants need to understand that value of appreciating the callers as the callers are bringing business to the organization. The facilitator needs to express the importance of it here.

**Facilitator reflection:**

- After a few of the sessions, it was determined that this was going to be a new behavior that needed to be learned by the participants. Upon understanding this, the facilitator started to do perform a very short improv role play for each of the greetings to demonstrate to the participants how it can be done. Depending on the behaviors that are conditioned and modeled at the healthcare facility this training may be utilized at, this is a good idea to do. It helped the participants understand what was expected of them. One example was performed with a warm transfer between departments and another was performed with out it to show the differences and why it was important.

## Forbidden Phrases

- "I don't know"
- "We can't do that"
- "You'll have to"
- "Just a second"
- "No" ..at the start of a sentence
- "That's not my job"
- "You're in the wrong department"

**Facilitator script:**

- Show the title of the slide only. Ask the participants this question- What are phrases that should not be said when speaking to customers?
- Allow the participants to engage and provide some examples of things not to say.
- Push them a little more and ask that question- What else?
- Show the bullets listed and quickly read and review them.
- Debrief this a bit and ask the question- What do you see wrong with all of these phrases? You want the participants to answer that they are all negative statements.
- Also state to the participants to be mindful of using internal jargon terms, especially when speaking to external customers. These terms may help the employee, however they are confusing to the customer.

**Facilitator notes:**

- The participants need to be mindful of what they say when speaking to customers both over the phone and in person. These phrases can be very impactful on the business of an organization in a negative way.
- You want the participants to recognize within themselves that these phrases are not correct and to begin to change negative language that they may use.

**Facilitator reflection:**

- This slide sparked dialogue and conversation amongst the participants, as many began to ask- What do we say instead?
- This heightened the anticipation a little, because the next slide addresses phrases that are acceptable.



## Recommended Phrases



- "I'll find out"
- "I'll connect you with someone who can help"
- "I'm glad you asked that; let's find out"
- "Here's what we can do"
- "It's good if you"
- "It's recommended that..."
- "I ask that you do this because..."
- "This may take a few minutes"
- "May I place you on hold while I help you?"

**Facilitator script:**

- Show the title of the slide only. Ask the participants this question- What are phrases that should be when speaking to customers?
- Allow the participants to engage and provide some examples of things to say.
- Push them a little more and ask that question- What else?
- Show the bullets listed and quickly read and review them.
- Debrief this a bit and ask the question- What do you see different with all of these phrases versus the previous slide? You want the participants to answer that they are all positive statements offering ability to help in the situation.

**Facilitator notes:**

- Again, the participants need to be mindful of what they say when speaking to customers both over the phone and in person. These phrases can be very impactful on the business of an organization in a positive way.

**Facilitator reflection:**

- The participants were embracing the recommended phrases. They began to understand the importance of using these phrases over using the phrase on the previous slide.

## Peter Drucker

Quality in a service or product is not what you put into it. It is what the client or customer gets out of it.

**Facilitator script:**

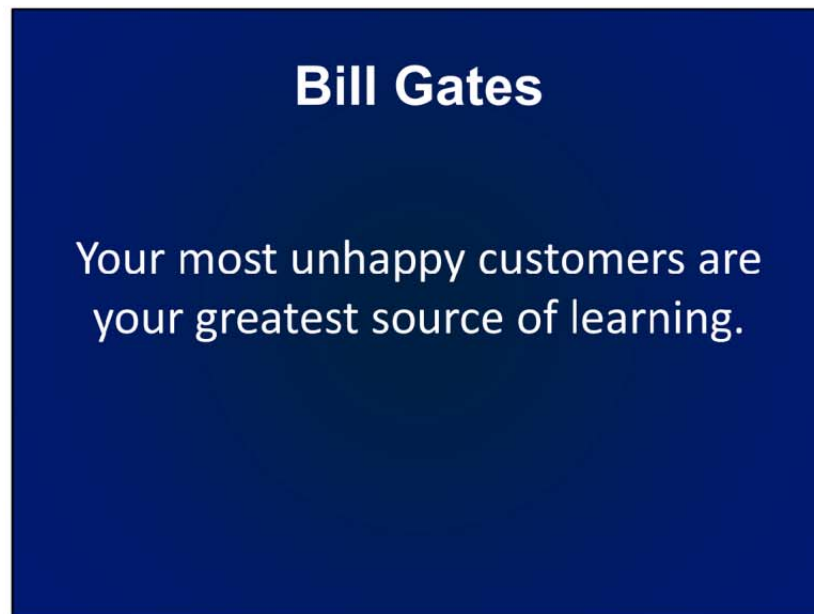
- State that Peter Drucker is a famous business and management consultant.
- Read his quote.
- Provide a 10 minute break to the participants.

**Facilitator notes:**

- At this time, the class has been run for approximately 1 hour and 15 minutes. The participants need a break at this point. They have been working the entire class up to this point.
- This quote was selected because of its value and for the participants to understand what quality is to a customer.

**Facilitator reflection:**

N/A



**Facilitator script:**

- Welcome the participants back to the class. Ask if there were any questions or comments regarding the previous segment. Allow 2-3 minutes for this. Any in-depth questions, ask to meet with the participant after the class.
- Identify who Bill Gates is, a co founder and former CEO of Microsoft.
- Read his quote.
- Ask the participants- What message do you think that Bill Gates was conveying?
- Allow for the participants to answer.

**Facilitator notes:**

- Want the participants to begin to look at challenging situations with customers in a more positive way.
- This quote is preparing the participants for the next segment of the class.

**Facilitator reflection:**

- The participants were curious about what was going to be discussed next.

## Handling Challenging Customers



### Facilitator script:

- Ask the class –Have you have ever experienced dealing with a customer that was upset/angry or was just really confused they were a challenge to work with?
- This question should spark some conversation amongst the participants
- Ask one of them to answer the question and ask a follow up question- How did you handle their challenges and what was the resolution?
- Ask for another example from another participant.
- Explain to the participants that when customers complain, they are giving you an opportunity to fix the challenge. This concept ties directly into the Bill Gates quote. Connect it into at this point in the conversation.
- Analyze the cartoon. Ask the participants to take notice of each of the character's body language. Draw attention to the woman's calm face. Explain that the shield is symbolic of the tools and knowledge that the woman has to handle challenges that keeps her calm.
- Explain that 1 bad experience will out way 10 good ones for a customer.
- Employees need to recognize that the emotions that a customer may portray are not personal; they are being directed at the organization.

### Facilitator notes:

- The purpose of this cartoon is to provide the participants a visual of what happens sometimes in person or over the phone when handling challenging customers.
- You want to give the participants the thought that the challenging situation can be



managed and maintained in a professional manner.

- In addition, you want to let the participants know that the situation can be turned around to end on a positive note.
- The purpose of this slide is to transition to a model to use to handle challenging customers.

**Facilitator reflection:**

- The participants were eager to learn how they could handle difficult situations with customers.

## L. A. S. T.

- **LISTEN**- Listen to the customer to hear what the concern is; ask questions for understanding; take notes
- **APOLOGIZE**- Apologize for any inconvenience the situation may have caused
- **SOLUTION**- Offer ways to resolve the problem
- **THANK**- Thank the customer for bringing the problem to your attention

### Facilitator script:

- Introduce L.A.S.T. as a 4 step model that has been used in customer service in the past as a way to resolve customer challenges. Explain that there are several models that are available, but this is just one that can be used.
- Read each bullet aloud, slowly for the participants to hear.
- State to the participants that we will be reviewing each step in detail.

### Facilitator notes:

- The purpose of this slide is to introduce a model to the participants that is easy to follow.
- Another reason is to provide a guide that the participants can stick to get from the situation being challenging to having a positive outcome.

### Facilitator reflection:

- The participants expressed acceptance of this 4 step model. After speaking to the participants in a few sessions, they did not have a tool like this to aid them, so they found this one to be helpful.

# Listening

When communicating feelings and attitudes:

**In Person:**

- 55% Body Language
- 38% Tone of Voice
- 7% Words used

**Over the Phone:**

- 82% Tone of Voice
- 18% Words used



Albert Mehrabian (1981)

**Facilitator script:**

- Explain that Al Meherabian at UCLA studied mixed messages. He studied messages and looked at what the weight or percentage out of each component.
- Show just the top of the slide first to the participants. Ask the question- When communication in person, out of 100% how much of the message is communicated thru body language, how much is communicated by tone of voice and how much is communicated by the words that you use?
- Allow the participants to take a few guesses at the percentage of each part.
- Reveal the bullets that show the percentage for the 3 parts of communicating in person.
- Explain to the participants the importance of proper body language and posture when speaking to someone in person. Also explain how important a person's tone of voice can impact how the message is received. This is another opportunity to express how important it is to smile at appropriate times when speaking.
- Describe that body language is essential for success when listening.
- Explain that if you are in person with someone, lean forward and give direct eye contact. Nod your head a few times to show the speaker that you hear what they are saying.
- The words used may score less than the other 2 parts, however they are still very important when communicating in person.
- Begin to review the next part of the slide- over the phone.
- Do not show the bullets and ask the participants this question- When communicating over the phone, out of 100% how much of the message is communicated thru tone of voice and how much is by the words used?
- Allow the participants to take a few guesses at the percentage of each part.

- Reveal the bullets to show the percentage of the 2 parts of communicating over the phone.
- Express the importance of acknowledging the caller over the phone.
- Tell the participants to make statements like- Please continue, I'm listening, or Okay, please tell me more- so that the caller knows that you are engaged. Explain that customers need to feel that they are being heard.
- Clarify for the participants that by listening, you are aligning yourself with the customer to say- I am not the enemy; I want to help.
- Tell the participants not to interrupt the customer.
- Explain to the customer that you may ask them to repeat something or slow down if you are taking notes to ensure that you have the correct information.
- Explain that over the phone it is HOW you say it, more than WHAT you say that is key.
- Even though it is not listed on the slide, make a note to briefly speak and explain about email communications, instant message and letters.
- Explain that in written forms of communication, since it is 100% words, there is no body language or tone of voice. The tone of message is implied by the choice of language used. With that being said, the facilitator needs to explain that if communicating in writing, that the word choice is key.

**Facilitator notes:**

- Take your time and carefully review each type of communication. This is critical to the participants' success when communicating with customers.
- The purpose of this slide is to show the importance of listening to the customer because without it, the participants will not know what the challenge is that needs to be overcome.


**Facilitator reflection:**

- Upon revealing the percentage breakdown of the message conveyed, some of the participants were surprised and expressed that.
- This was an opportunity for the participants to rethink how they interact with customers over the phone, in person, and in writing.



# Apologize

- Separate the apology and the explanation
  - State what the apology is for and be sincere! Do not provide reasons the circumstances took place.
- Take ownership of the situation
  - When taking ownership, now explain what took place
  - Express empathy; it shows customer you care about his or her needs


 A cartoon illustration of a man with blonde hair, wearing a blue shirt and tie, standing in front of a blue rectangular block. He has a speech bubble above him that says "I'D LIKE TO APOLOGIZE...".
**Facilitator script:**

- Introduce the Apology slide as the next step in the model.
- As the facilitator, read the slide slowly to the class.
- When reading the first bullet, explain that the customer is simply looking for someone to apologize and not for any excuses.
- Sincerity is key, as a customer will see right through you if it is phony and will not accept the apology.
- State the importance of not offering an explanation yet. This will be perceived as making an excuse for what took place. The customer at this point is simply looking for someone to apologize and is not looking for any excuses.
- Explain to the participants the importance of taking ownership of the situation. This shows that the employee cares about the needs of the customer.
- When taking ownership, explain to the participants to remain professional. In the eyes of the customer, no matter who made the mistake all of the employees are at fault. They do not want to hear that someone else messed up, nor do they care.
- Tell the participants to express empathy when apologizing because it goes a long way.

**Facilitator notes:**

- The participants need to understand this key point in the model. This is a transition point to begin to turn a challenging situation into a positive one.

**Facilitator reflection:**

- Participants understood this step to be very important.

## Solutions

- Offer the customer ways to resolve the problem
  - If there is more than 1 possible solution, allow the customer to choose which would fit his or her needs best
  - Offer ways to prevent the problem from happening in the future



### Facilitator script:

- Review the slide with the participants.
- Remind the participants of the puzzle exercise from the beginning of the class.
- State to the participants that each employee is part of the customer's experience and the importance of everyone doing their part. If a piece is missing, then the customer experience may not be a good one.
- Explain that the more variety a customer has for solutions, then the easier it is for the customer to find one that suits their needs.
- Encourage the employees to be novel when searching for solutions for customers.
- Explain to the employees that offering ways to prevent the problem in the future helps mitigate the possibility of the same problem from happening again. In addition, if it does happen again, the employee would be experienced to know how to handle the situation.

### Facilitator notes:

- The participants need to break out the paradigm that there is only one way to resolve a challenge.
- In addition, they need to understand and have ways to handle the same or similar problems in the future.

### Facilitator reflection:

N/A

## Solutions Contd.

- Manage expectation of how long it will take to resolve the matter
- Follow up with the customer to ensure satisfaction of the resolution

**Facilitator script:**

- Facilitator reads the slide to the participants.
- Facilitator expresses the importance of managing expectation. This is the point in the model that a timeline is laid out to let the customer know how long it will take to fix what is wrong.
- Facilitator explains that the customer time is valuable and that a solution should be provided as quickly as possible.
- Facilitator also explains the importance of making sure that the solution fits the challenge and to follow up with the customer to ensure satisfaction.
- Explain to the participants to attempt to exceed expectation to gain customer happiness.

**Facilitator notes:**

- This is important to teach to the participants, because the follow up begins the transition to the closure of the situation.

**Facilitator reflection:**

N/A

**Facilitator script:**

- The Facilitator reviews the slide with the participants.
- Explain to the participants the importance of thanking the customer. The customer wants to feel valued.
- Provide examples of things that customer say like- I've been a good customer of yours for 10 years, I've spent a lot of money with your company over the years, and I like your product and use it even though it's more expensive than others.
- Explain that thanking the customer is also important because the customer brought up a problem that the organization may not have been aware of.

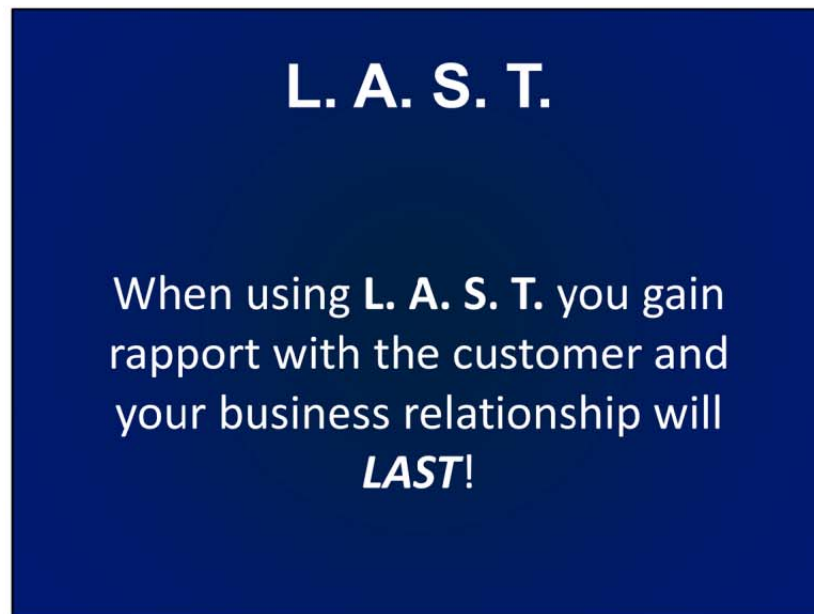
**Facilitator notes:**

- The purpose of this slide is to express to the participants the importance of being grateful for the business of the customer. Without it, the Hospital would not be in business.

**Facilitator reflection:**

N/A



**Facilitator script:**

- Read the slide
- Ask the participants if they have any questions regarding the model L.A.S.T.
- Answer any questions that are raised.
- Close the model by stating that by utilizing this tool, you can turn an angry customer into an appreciative one.
- Go back to one of the examples that the participants gave at the beginning of the segment and ask the participant to use the model in the same scenario to show how it could be used.
- Offer a 5 minute break to the participants.

**Facilitator notes:**

- This is a closing slide of the model to transition to the last segment of the class.

**Facilitator reflection:**

- This was a good way to show the participants how to handle tough situations. By showing how it could be applied to a real life situation, the facilitator believes that it helped greatly in the learning.

## Role Plays

**Facilitator script:**

- Since role plays are complex, prior to the class, conduct research on how to conduct role plays.
- Research works from scholars such as E. Paul Torrance, a psychologist whose did a tremendous amount of work in the field of Creativity. Other scholars to research are Mary Murdock whose work was conducted while at the International Center for Studies in Creativity, and Tammy Safter who worked closely with Torrance. These scholars and researchers studied Sociodrama.
- Select role play scripts that are more specific and tailored to the needs of the specific work environment and organization that the participants work in.
- Set definitive ground rules for the role play.
- Reaffirm several times that the roles are being played in a safe environment.
- Remind the participants that the behavior of the character is going to be debriefed, not the actual participant.
- Allow the participants to act out the role play scenarios.
- Conduct a thorough and safe debrief session with the participants.

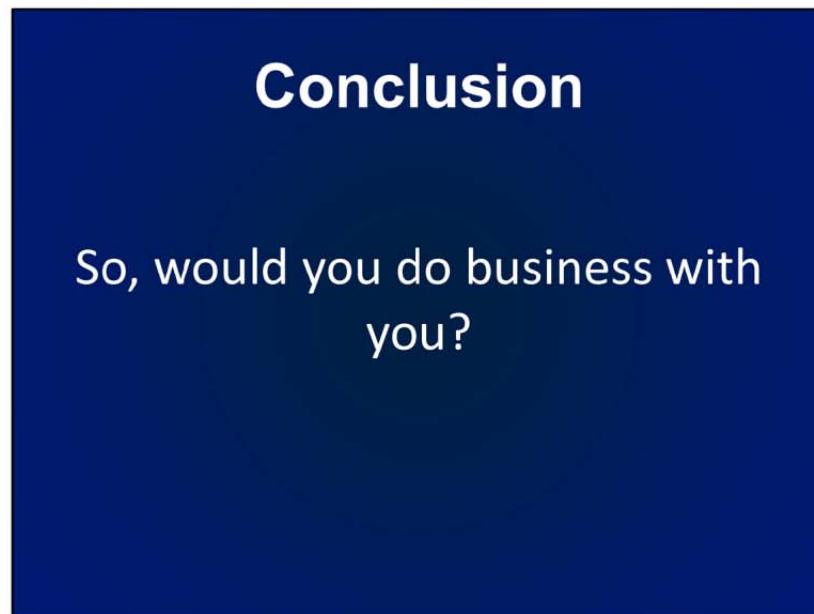
**Facilitator notes:**

- It is imperative that the Facilitator knows what to do when conducting a role play as the participants' psyches are involved. The purpose of role plays is for the participants to practice the new learned behavior in a safe environment.
- Be particularly careful during the debrief to deliberately separate the participant from the role being played.

- The Facilitator should recognize that there is both high risk and high reward in learning when conducting role play scenarios.

**Facilitator reflection:**

- It is suggested that the Facilitator monitor and evaluate the role play scenarios as they are being conducted.

**Facilitator script:**

- Ask the class the question that began the class that was on the title slide- Would you do business with you?
- Ask the participants to think about if the answer were no, has the answer changed?
- Request feedback from 2-3 participants.
- Pass out the take away brochures that can be used as cheat sheet of the concepts taught during the class.
- Enclosed are 2 pledges for the participants to complete. Provide the instructions on how to complete them. The participants are to complete both the same way. The participant signs it and the manager signs it.
- One copy stays with the manager to go into the employee file.
- One copy stays with the participant so that he or she can see what they have written down that they would like to improve upon.

**Facilitator notes:**

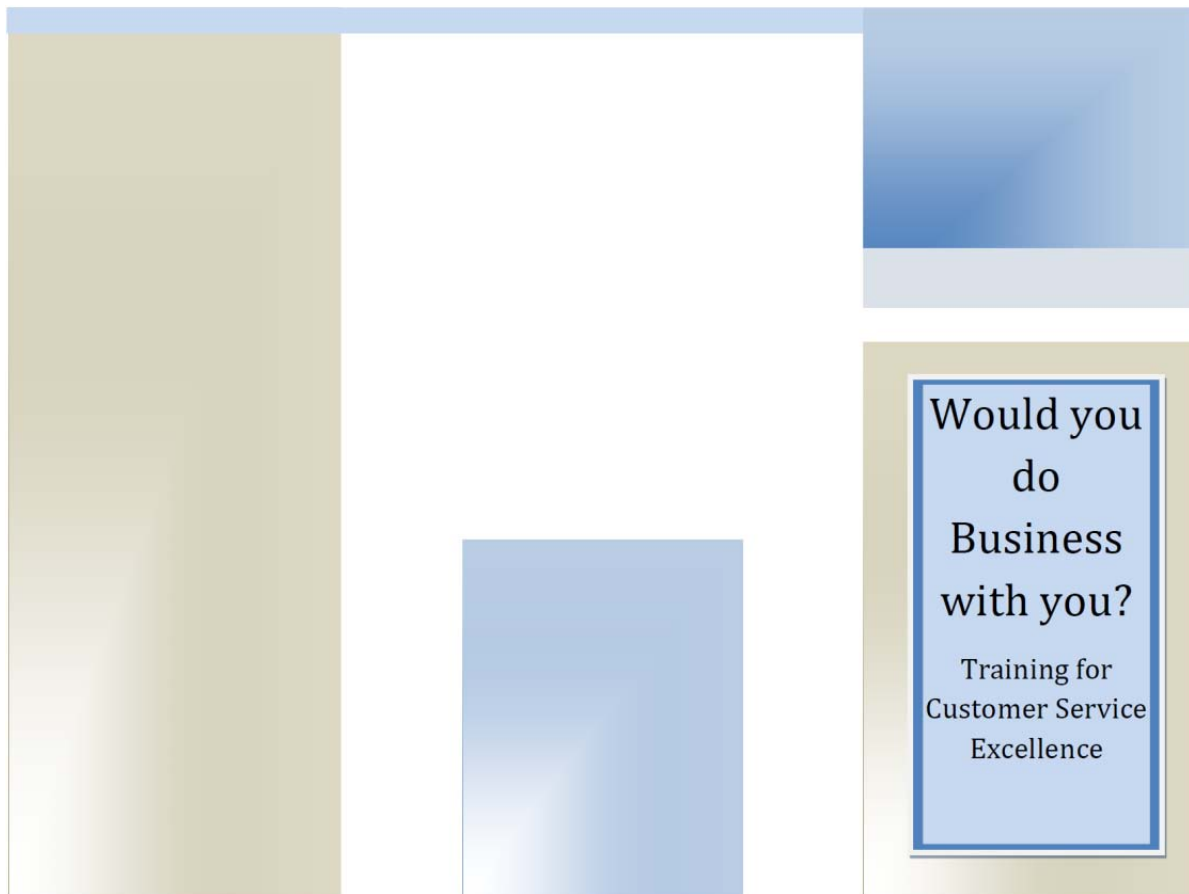
- The purpose of asking the question again is for the participant to really think about if he or she would do business with themselves, knowing the quality of service that they provide.
- The pledge cards are an attempt to challenge the participant to be serious not only about the participation of the class, but to change the environment and culture of the Hospital to be more customer oriented.
- The pledge shows that accountability was required.
- The brochure is a tool to help remind the participants about what was taught during the

class and to be utilized.

**Facilitator reflection:**

- Participants expressed that they learned a great deal and were challenged in their thinking when it came to how they approached excellent customer service.

## Appendix B-Participant Handout Brochure



## Greetings/Hold/Closing

**When answering in person:** "Welcome to the Community Health Center of Buffalo/Niagara. My name is... how may I help you?"

**When answering the Call:** "Thank you for calling the Community Health Center of Buffalo/Niagara. My name is... how may I help you?"

**When placing Caller on hold:** "May I place you on hold? (Allow for the caller to respond) Thank you."

**When closing the Call:** "Thank you for calling the Community Health Center of Buffalo/Niagara."

## Etiquette

Address the Caller properly by his or her title

Be Respectful

Speak clearly. Use your normal tone of voice when answering a call

Do not use slang words or poor language

Do not eat or drink

Never use swear words

Listen to the Caller and what they have to say

Be patient and helpful

**Smile!**

## Recommended Phrases



"I'll find out"  
 "I'll connect you with someone who can help"  
 "I'm glad you asked that; let's find out"  
 "Here's what we can do"  
 "It's good if you"  
 "It's recommended that..."  
 "I ask that you do this because..."  
 "This may take a few minutes"  
 "May I place you on hold while I help you?"

## Forbidden Phrases



"I don't know"  
 "We can't do that"  
 "You'll have to"  
 "Just a second"  
 "No" ... at the start of a sentence  
 "That's not my job"

## L. A. S. T.



**LISTEN**- Listen to the customer to hear what the concern is; ask questions for understanding; take notes



**APOLOGIZE**- Apologize for any inconvenience the situation may have caused



**SOLUTION**- Offer ways to resolve the problem



**THANK**- Thank the customer for bringing the problem to your attention



## Appendix C- Participant Feedback of Customer Service Workshop

### New Survey



#### 1. Tone of Trainer's voice

	Performs above standard (Demonstrates Consistency)	Meets Expectations	Needs Improvement	N/A	Rating Average	Response Count
Voice Quality	83.8% (62)	16.2% (12)	0.0% (0)	0.0% (0)	1.16	74
Comments						10
answered question						74
skipped question						0

#### 2. Pitch of Trainer's voice

	Performs above standard (Demonstrates Consistency)	Meets Expectations	Needs Improvement	N/A	Rating Average	Response Count
Voice Quality	79.7% (59)	20.3% (15)	0.0% (0)	0.0% (0)	1.20	74
Comments						5
answered question						74
skipped question						0



**3. Volume of Trainer's voice**

	Performs above standard (Demonstrates Consistency)	Meets Expectations	Needs Improvement	N/A	Rating Average	Response Count
Voice Quality	78.4% (58)	21.6% (16)	0.0% (0)	0.0% (0)	1.22	74

Comments 7

answered question 74

skipped question 0

**4. Rate of speed Trainer spoke**

	Performs above standard (Demonstrates Consistency)	Meets Expectations	Needs Improvement	N/A	Rating Average	Response Count
Voice Quality	85.1% (63)	9.5% (7)	0.0% (0)	5.4% (4)	1.10	74

Comments 5

answered question 74

skipped question 0

### 5. Appropriate use of facial expressions and gestures from trainer

	Performs above standard (Demonstrates Consistency)	Meets Expectations	Needs Improvement	N/A	Rating Average	Response Count
Body Language	85.1% (63)	12.2% (9)	0.0% (0)	2.7% (2)	1.13	74

Comments 10

answered question 74

skipped question 0

### 6. Trainer provided relevant examples to subject matter in class

	Performs above standard (Demonstrates Consistency)	Meets Expectations	Needs Improvement	N/A	Rating Average	Response Count
Presentation	83.8% (62)	14.9% (11)	1.4% (1)	0.0% (0)	1.18	74

Comments 9

answered question 74

skipped question 0

**7. Trainer properly used flipchart/whiteboard**

	Performs above standard (Demonstrates Consistency)	Meets Expectations	Needs Improvements	N/A	Rating Average	Response Count
Presentation	68.9% (51)	25.7% (19)	2.7% (2)	2.7% (2)	1.32	74

Comments 8

answered question 74

skipped question 0

**8. Trainer established eye contact with each participant**

	Performs above standard (Demonstrates Consistency)	Meets Expectations	Needs Improvement	N/A	Rating Average	Response Count
Presentation	93.2% (69)	6.8% (5)	0.0% (0)	0.0% (0)	1.07	74

Comments 10

answered question 74

skipped question 0

**9. Trainer moved around the room during presentation**

	Performs above standard (Demonstrates Consistency)	Meets Expectations	Needs Improvement	N/A	Rating Average	Response Count
Presentation	91.9% (68)	8.1% (6)	0.0% (0)	0.0% (0)	1.08	74

Comments 8

answered question 74

skipped question 0

**10. Trainer asked open and closed ended questions**

	Performs above standard (Demonstrates Consistency)	Meets Expectations	Needs Improvement	N/A	Rating Average	Response Count
Presentation	85.1% (63)	14.9% (11)	0.0% (0)	0.0% (0)	1.15	74

Comments 9

answered question 74

skipped question 0

**11. Trainer properly addressed participants' questions and/or concerns**

	Performs above standard (demonstrates Consistency)	Meets Expectations	Needs Improvement	N/A	Rating Average	Response Count
Presentation	83.8% (62)	16.2% (12)	0.0% (0)	0.0% (0)	1.16	74

Comments 7

answered question 74

skipped question 0

**12. Trainer provided clear directions during facilitation and activities**

	Performs above standard (Demonstrates Consistency)	Meets Expectations	Needs Improvement	N/A	Rating Average	Response Count
Presentation	89.2% (66)	10.8% (8)	0.0% (0)	0.0% (0)	1.11	74

Comments 6

answered question 74

skipped question 0

13. Trainer covered topic in the time allotted						
	Performs above standard (Demonstrates Consistency)	Meets Expectations	Needs Improvement	N/A	Rating Average	Response Count
Presentation	81.1% (60)	14.9% (11)	0.0% (0)	4.1% (3)	1.15	74
Comments						2
answered question						74
skipped question						0
14. Additional Comments						
						Response Count
						24
answered question						24
skipped question						50

Q1. Tone of Trainer's voice		
1	very calm when speaking. even toned, polite	Jul 13, 2012 9:17 AM
2	I understood everything you said	Jul 13, 2012 9:14 AM
3	does not seem as if she is rude and comes off nice and joyful	Jul 12, 2012 4:35 PM
4	Had a nice tone for different topics, tone would change depending on topic.	Jul 12, 2012 4:32 PM
5	great	Jul 12, 2012 4:19 PM
6	Excellent	Jul 10, 2012 7:13 PM
7	Very well spoken	Jul 10, 2012 7:08 PM
8	The trainer was very informativeand did an excellent job in helping participants feel relaxed about the training. Could tell that she was passionate about providing good customer service to customers. Provided a relaxed atmosphere.	Jul 10, 2012 7:04 PM
9	Well spoken	Jul 10, 2012 7:01 PM
10	Tone was pleasant, yet firm	Jul 10, 2012 6:51 PM

Q2. Pitch of Trainer's voice		
1	I heard you clearly	Jul 13, 2012 9:14 AM
2	really dont understand pitch	Jul 12, 2012 4:32 PM
3	great	Jul 12, 2012 4:19 PM
4	Excellent	Jul 10, 2012 7:13 PM
5	Very even pitch	Jul 10, 2012 7:08 PM

Q3. Volume of Trainer's voice		
1	speaks loudly and clearly	Jul 13, 2012 9:14 AM
2	excellent	Jul 12, 2012 4:19 PM
3	Loud enough to hear and understand	Jul 12, 2012 4:17 PM
4	Excellent	Jul 10, 2012 7:13 PM
5	Clarity is excellent	Jul 10, 2012 7:08 PM
6	Perfect volume	Jul 10, 2012 7:01 PM
7	Volume was clear and at an appropriate level	Jul 10, 2012 6:51 PM

Q4. Rate of speed Trainer spoke		
1	very informative	Jul 12, 2012 4:37 PM
2	she performed above standard (professionally)	Jul 12, 2012 4:32 PM
3	Excellent	Jul 12, 2012 4:19 PM
4	Excellent	Jul 10, 2012 7:13 PM
5	Spoke with a flow	Jul 10, 2012 7:08 PM



Q5. Appropriate use of facial expressions and gestures from trainer		
1	made positive facial expressions and gestures the whole time	Jul 13, 2012 9:14 AM
2	facial expressions and gestures gave better understanding	Jul 13, 2012 9:10 AM
3	she made me feel comfortable because she looked comfortable doing the presentation/seminar	Jul 12, 2012 4:35 PM
4	would do extremely well when it came to giving examples on different topics	Jul 12, 2012 4:32 PM
5	smiling, eye contact	Jul 12, 2012 4:23 PM
6	smiling, eye contact	Jul 12, 2012 4:22 PM
7	good	Jul 12, 2012 4:19 PM
8	Excellent	Jul 10, 2012 7:13 PM
9	used well	Jul 10, 2012 7:08 PM
10	Trainer was both personable and pleasant	Jul 10, 2012 6:51 PM

Q6. Trainer provided relevant examples to subject matter in class		
1	gave examples for every subject spoke upon	Jul 13, 2012 9:14 AM
2	examples that made sense	Jul 13, 2012 9:07 AM
3	even asked the participants for examples of their own and relates to them	Jul 12, 2012 4:35 PM
4	always showed and gave good examples	Jul 12, 2012 4:32 PM
5	facilitated many opportunities for participants to "jump in"	Jul 12, 2012 4:23 PM
6	good	Jul 12, 2012 4:19 PM
7	Using things like restaurants	Jul 12, 2012 4:17 PM
8	Excellent	Jul 10, 2012 7:13 PM
9	Examples were good	Jul 10, 2012 6:51 PM

Q7. Trainer properly used flipchart/whiteboard		
1	was on point while using the overhead	Jul 13, 2012 9:14 AM
2	writing down opinions	Jul 13, 2012 9:10 AM
3	materials were set properly and was prepared and organized	Jul 12, 2012 4:32 PM
4	good timing, not too fast, nor slow, just right	Jul 12, 2012 4:22 PM
5	good	Jul 12, 2012 4:19 PM
6	Excellent	Jul 10, 2012 7:13 PM
7	well done	Jul 10, 2012 7:08 PM
8	Flipchart provided, nice visuals for follow along, but not necessary	Jul 10, 2012 6:51 PM

Q8. Trainer established eye contact with each participant		
1	very well	Jul 13, 2012 9:18 AM
2	made to feel she was talking to me	Jul 13, 2012 9:16 AM
3	made eye contact with whoever you were speaking to	Jul 13, 2012 9:14 AM
4	helps the participants stay intrigued and listening to her	Jul 12, 2012 4:35 PM
5	Looked around the room at everyone, even some of the quiet people. She acknowledged everyone's presence.	Jul 12, 2012 4:32 PM
6	not just one with all at the same time	Jul 12, 2012 4:22 PM
7	good	Jul 12, 2012 4:19 PM
8	Excellent	Jul 10, 2012 7:13 PM
9	good eye contact	Jul 10, 2012 7:08 PM
10	Eye contact kept	Jul 10, 2012 6:51 PM

Q9. Trainer moved around the room during presentation		
1	constantly moving around during the presentation	Jul 13, 2012 9:14 AM
2	keeps me awake	Jul 13, 2012 9:10 AM
3	did alot!	Jul 13, 2012 9:07 AM
4	Wasn't just in one spot in the room looking around or anything. she moved throughout the room.	Jul 12, 2012 4:32 PM
5	good	Jul 12, 2012 4:19 PM
6	Excellent	Jul 10, 2012 7:13 PM
7	body language excellent	Jul 10, 2012 7:08 PM
8	Good movement	Jul 10, 2012 6:51 PM

Q10. Trainer asked open and closed ended questions		
1	constantly asked open and closed ended questions	Jul 13, 2012 9:14 AM
2	does not leave you with "what if"	Jul 13, 2012 9:07 AM
3	constantly asking questions because she wanted everyone's feedback and wanted to hear everyone	Jul 12, 2012 4:32 PM
4	good Jamilla. does what most people dont	Jul 12, 2012 4:22 PM
5	good	Jul 12, 2012 4:19 PM
6	Excellent	Jul 10, 2012 7:13 PM
7	helped you to think more about scenarios	Jul 10, 2012 7:08 PM
8	Did this alot	Jul 10, 2012 7:01 PM
9	Questions provoked thought and self evaluation	Jul 10, 2012 6:51 PM

Q11. Trainer properly addressed participants' questions and/or concerns		
1	was very respectful while addressing participants and/or concerns	Jul 13, 2012 9:14 AM
2	asked and answered all questions	Jul 13, 2012 9:10 AM
3	gave everyone all the chances in the world to speak	Jul 12, 2012 4:32 PM
4	encouraged asking questions	Jul 12, 2012 4:23 PM
5	good	Jul 12, 2012 4:19 PM
6	Some of these questions seemed to cause topics to be unnecessarily overdone	Jul 10, 2012 7:17 PM
7	Excellent	Jul 10, 2012 7:13 PM

Q12. Trainer provided clear directions during facilitation and activities		
1	very understandable	Jul 13, 2012 9:16 AM
2	for every activity, directions were clearly provided	Jul 13, 2012 9:14 AM
3	directions were very clear, completely understood	Jul 12, 2012 4:32 PM
4	good	Jul 12, 2012 4:19 PM
5	Excellent	Jul 10, 2012 7:13 PM
6	good	Jul 10, 2012 7:08 PM

Q13. Trainer covered topic in the time allotted		
1	a little off, but it was worth it!	Jul 12, 2012 4:32 PM
2	Excellent	Jul 10, 2012 7:13 PM

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Q14. Additional Comments		
1	Excellent presentation	Jul 13, 2012 9:24 AM
2	Air Force is good people. You did an excellent job	Jul 13, 2012 9:24 AM
3	This was an inservice worth taking. We think that in our jobs we are doing all we can. This class showed that we can do a little more.	Jul 13, 2012 9:23 AM
4	Did a really good job. Come back again.	Jul 13, 2012 9:19 AM
5	professional, good speaker	Jul 13, 2012 9:17 AM
6	She was very informative. Knew what she was talking about. Very good at giving solutions	Jul 13, 2012 9:17 AM
7	Thank you for being so nice and teaching me about customer service. You taught me alot, and I will continue to use what I learned today in the future.	Jul 13, 2012 9:14 AM
8	a pleasure to meet	Jul 13, 2012 9:07 AM
9	Thank you for your knowledge	Jul 12, 2012 4:37 PM
10	Excellent, interesting presentation/training.Great ability to connect with people and get people to listen. Good information for participants to take away. Fun was had by all.	Jul 12, 2012 4:36 PM
11	Jamilla is definately a people person(so that how she came off) and made me feel good as a person! She made me feel a lot comfortable once I started to see more of her as a person and has really good communicating skills. I really enjoyed the presentation mostly because of her because she was just full of life and gave off a good feeling. She's good at what she does.	Jul 12, 2012 4:32 PM
12	The toys were a great aspect to keep our attention focused on you! it worked :)	Jul 12, 2012 4:23 PM
13	Does all things above standard as far as voice quality, body language and presentation	Jul 12, 2012 4:17 PM
14	All was done and explained well, and there were some good pointers that I learned from to be a more proficient customer service rep. Jamilla kept a smile through the entire training.	Jul 10, 2012 7:19 PM
15	I felt this program was overly simplified where it would be more appropriate for a teenage crowd than a professional audience. Many points overdone;I feel this training would be adequateley completed in 1 hour; however, it seemed that it should be common sense. Jamilla was very comfortable with the material presented and does well with public speaking.	Jul 10, 2012 7:17 PM
16	:)	Jul 10, 2012 7:13 PM
17	A very good job Jamilla!	Jul 10, 2012 7:10 PM
18	This was a much-needed training and I would like to see more training sessions in different areas.	Jul 10, 2012 7:04 PM
19	I enjoyed her and it was fun and educational.	Jul 10, 2012 7:02 PM

Q14. Additional Comments		
20	She was great. I think that this presentation was well worth it. I liked the method called L.A.S.T. The pledge was very good. Good handout.	Jul 10, 2012 7:01 PM
21	Very needed to improve performance of CHCB/CHCN staff. Good... (handwriting illegible). Good luck at your job	Jul 10, 2012 6:58 PM
22	This training was beneficial for self evaluation and thinking about perception from other staff and patients.	Jul 10, 2012 6:51 PM
23	Excellent! Loved the exercises	Jul 10, 2012 6:47 PM
24	Well done and fun!	Jul 10, 2012 6:45 PM

### Appendix D- Recommended Readings

In addition to the works referenced in this project I suggest the following literature for the reader to investigate and gain knowledge on training and facilitation:

Bens, I. (2012). *Facilitating with ease! Core skills for facilitators, team leaders and members, managers, consultants, and trainers*. Hoboken, NJ: John Wiley & Sons

De Bono, E. (1985). *Six thinking hats*. Boston, MA: Little, Brown & Company

Foucar-Szocki, D. (1982). *Possible predictors for effectiveness in the facilitation of creative problem solving*. (Unpublished masters project). Buffalo State College, Buffalo, NY.

Firestien, R. (2000). *Why didn't I think of that: A guide to better ideas and decision making: a fable*. Williamsville, NY: Innovation Systems Group

Grivas, C., & Puccio, G. J. (2012). *The innovative team: Unleashing creative potential for breakthrough results*. San Francisco, CA: Jossey-Bass

Hughes, M. (2011). *Emotional intelligence in action training and coaching activities for leaders, managers, and teams*. Hoboken, NJ: John Wiley & Sons

Osborn, A. F. (1953, 1957, 1963, 1967). *Applied imagination: principles and procedures of creative thinking*. New York, NY: Scribners.

Parnes, S. J. (Ed). (1992). *Source book for creative problem solving*. Buffalo, NY: Bearly Limited.

Puccio, G . J., Mance, M., Switalski, L. B., & Reali, P. D. (2012). *Creativity rising*. Buffalo, NY: ICSC Press

Torrance, E. P., Murdock, M., & Fletcher, D. (1996). *Creative problem solving through role playing*. Pretoria, PA: Benedic Books



Torrance, E. P. & Safter, H. T. (1990). *The incubation model of teaching: Getting beyond the aha!* Buffalo, NY: Bearly Limited

Torrance, E. P., & Safter, H. T. (1999). *Making the creative leap beyond*. Buffalo, NY: Creative Education Foundation Press

Treffinger, D. J., Isaksen S. G., & Firestien, R. L. (1982). *Handbook for creative learning*. Sarasota, FL: Center for Creative Learning

Wilkinson, M. (2012). *The secrets of facilitation* (2<sup>nd</sup> ed). New York, NY: John Wiley & Sons